

Contract Portfolio Training

Tuesday, July 15, 2014, 9 a.m. – 2:30 p.m.

Kalanimoku Building, Room 322B

1151 Punchbowl Street

What contracts do we need in place in order to be efficient and effective for the business of government? How do we capture the value of our purchasing activities to build the right “portfolio” of contracts to make this happen?

This training focuses on the fundamentals of why the contract portfolio is important, the different methods that we can consider to create a strong contract portfolio, and the fundamentals of researching opportunities and developing alternatives assessments.



Registration - To register, email Ruth.A.Baker@hawaii.gov or call 587-4701 by 4 p.m., July 14, 2014.

9:00-9:45 a.m. - Fundamentals & Planning

The “Contract Portfolio Management: Fundamentals and Planning” training module will be an introduction to set context and provide a high-level overview of managing multiple contracts across an agency or an enterprise. The training will define contract portfolio management, category management as an organizational approach, and the components that need to be in place for it to be effective. This module also addresses forms of opportunity identification that do not require enterprise spend analysis, including assessments of individual requisition, tracking of similar requests, stakeholder outreach, and low impact procurement planning requests targeted to agencies to allow for high level opportunity identification

10:00-11:45 a.m. - Sourcing Strategies

The “Contract Portfolio Management: Sourcing Strategies” training module will discuss varying sourcing strategies available to buyers that should be considered in development of an Opportunity Assessment. The training will start with simpler, more classic sourcing strategies and build toward more complex sourcing strategies.

1:15 – 2:30 p.m. - Developing Opportunity Assessments

The “Contract Portfolio Management: Researching Opportunities & Developing Opportunity Assessments” training module will provide detail of assembling analysis into decision documents for executives, specifically addressing how to perform research to identify key characteristics of the opportunity, document the research into an Opportunity Assessment that builds a business case for a future procurement, and prioritize opportunities into an actionable plan.

Breakout Option for July 16

For class attendees who would like to schedule individual discussions about applying class material to specific issues, the instructors will meet on a first come-first served basis to brainstorm and advise on applying class topics. Sessions will be an hour long and start at 9:00 a.m. on Wednesday, July 16. Please see class instructors for more information.

Class Instructors

Dustin Lanier, CPPO - Founder and Principal Consultant for Civic Initiatives

Dustin has led of assessments of multiple state level administrative programs across the nation. Prior to Civic Initiatives, he held a variety of leadership roles related to strategic planning and contracting in Texas state government over 10 years. As the Executive Director for the Council on Competitive Government, Lanier led multiple procurement initiatives on behalf of state leadership which were responsible for over \$37 million in savings, in diverse spend categories, including fleet, fuel, print, mail, electronic payments, software licensing, and geographic information assets. Lanier is a Certified Public Procurement Officer.

Derrek Davis, PMP, CIA, CISA - Engagement Manager for Civic Initiatives

Derrek is an experienced professional with a background in business, financial and technology analysis garnered during his 10 years of services with the State of Texas, including lead analyst with the Council on Competitive Government. At Civic Initiatives, Davis is the primary project lead in the assessment, analysis and report generation for client engagements. Davis also brings complementary current skills as a Certified Internal Auditor, a Certified Project Management Professional and a Certified Procurement Manager.